Quick Reference Guide

Empowered by Innovation

NEC

UC for Business
Desktop Agent

Revision History

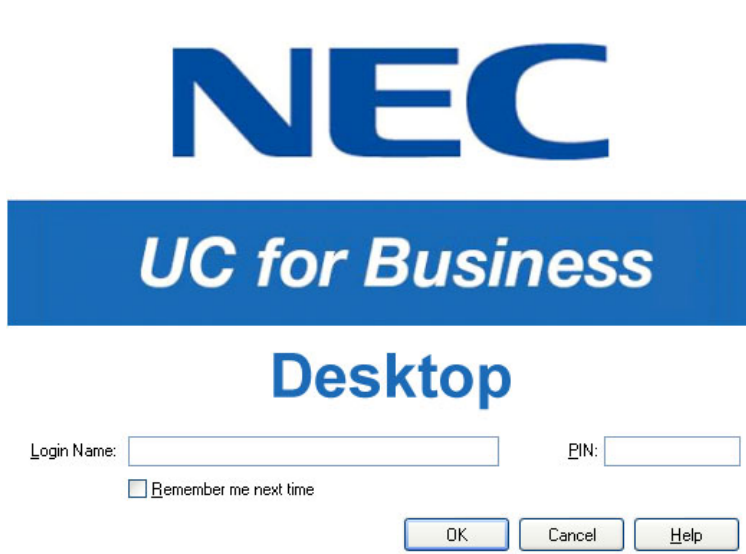| Document No.	Release Date	Change Description
003NEC-00QRGR	04/13/11	Initial release.

Table of Contents

Introduction

Agent Desktop is designed to enhance handling and reporting of calls into a queuing environment. The Desktop module gives contact center and customer service agents the ability to manage phone calls from a PC. View all the information about current calls, queues you are logged into, and other agents who are working, and perform extensive call and voicemail actions from this one easy-to-use application on the PC. This guide provides step-by-step instructions on how to use the Agent Desktop product.

Log Into and Out of Desktop

Log into Desktop

Before logging into queues as an agent, you must first log into Agent Desktop.

1. On the PC's Desktop, double-click the **Desktop** shortcut icon.

2. In the **Login Name** field, type your full name (your name may automatically display after typing a few letters).
3. In the **PIN** field, type the PIN number (initially the PIN is 2222 until you change it to a unique number).
4. Optional: Click the **Remember Me Next Time** option to save this login information for the next time you start Desktop.

Log Out of Desktop

1. Log out of the queues (if necessary).
2. Use any of the following methods to log out of Desktop:
    *   Click the **Close** button (the red **X** in the upper right-side of Desktop).
    *   From the **File** menu, select **Exit**.
    *   Press **Alt** + **F4**.

Change the PIN

Note: The first time starting Desktop, the Desktop Setup wizard automatically runs and prompts to change the default PIN. Refer to the *User System Setup Quick Reference Guide* for details.

1. From the **File** menu, select **Change PIN**.

2. In the **Old PIN** field, type the old PIN (the default PIN is **2222** until a new PIN is created).
3. In the **New PIN** field, type the new PIN.
4. In the **Verify New PIN** field, again type the new PIN.

Note: Remember to enter the new PIN the next time you open Desktop.

Access the Queues from Desktop

Log into a queue to receive and process inbound queue calls.

Agent Status Toolbar
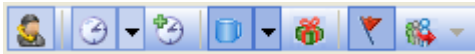
Icon	Name
	Agent Queue Log In/Log Out
	Request Worktime
	More Worktime
	Take a Break
	Resolve Call
	Raise an Alert (notify a supervisor that you need help)
	Request a Queue Call (requests from all queues in your login class)

Log into Queues

1. On the Agent Status toolbar, click the **Log into Queues** icon.
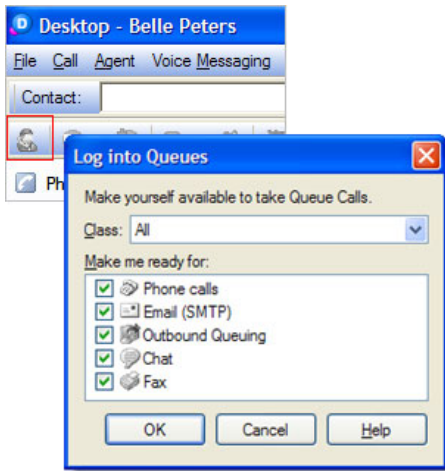
2. From the **Class** list, select a class (or leave the default class) to become available to take queue calls.
3. Optional: In the **Make Me Ready for** section, click all the media types you want to accept.

> **Note:** Depending on the Class selected, certain media options may not be available.

4. Click **OK**.

Log Out of All Queues

➢ Click the **Log Out of Queues** icon (same as **Log into Queues** icon) to log out.

> **Note:** Inbound direct calls will still go to your extension.

Executive Desktop Procedures

While being logged into queues, all standard Executive Desktop functionality is still applicable. Refer to the *Executive Desktop User Quick Reference Guide* for details.

The Agent Desktop Interface

The Agent Desktop Graphical User Interface (GUI) contains the following:

- Active Calls window = Displays any active calls and the active calls' status.
- Queues window = Displays queue and agent information.
- Agent menu = Performs essential agent functions.
- Agent Status toolbar = Performs essential agent functions.
- Agent views = Select different views of contact center information.
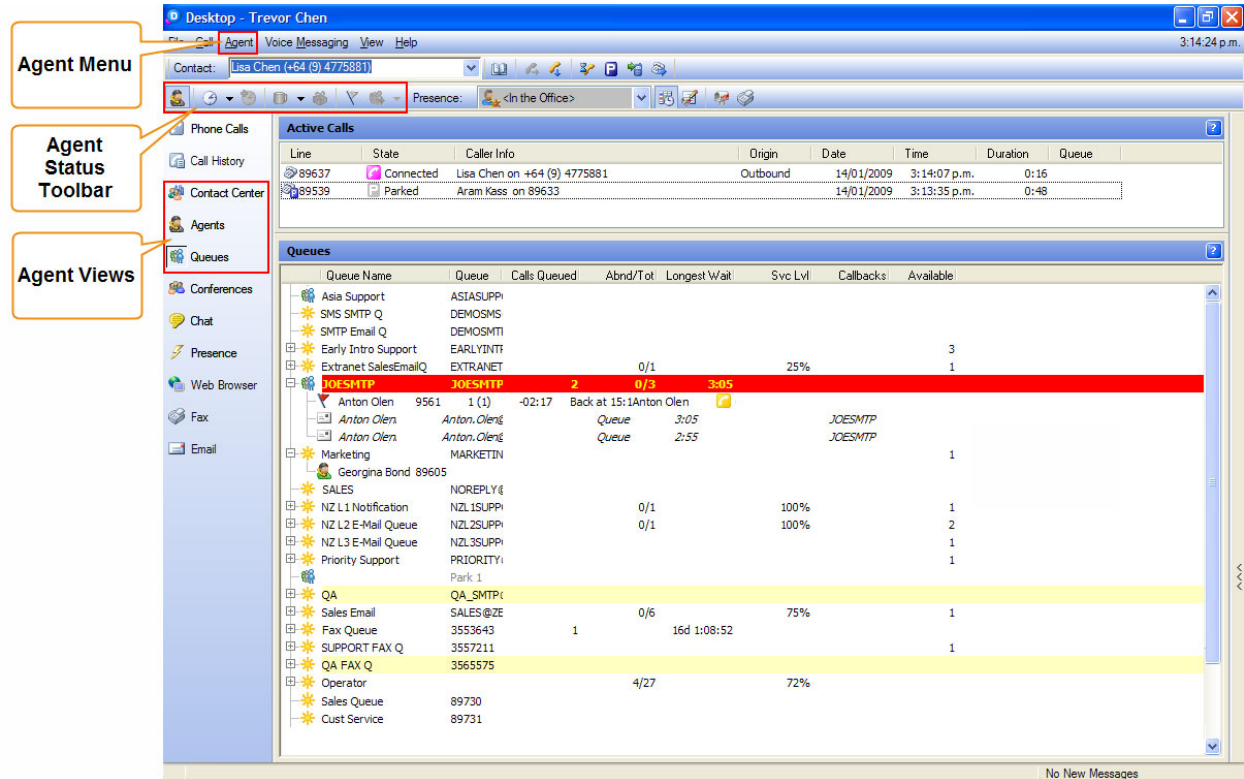
Select a Queue to View

➢ Select which queues to display using **File** menu | **Preferences** | **Select Queues**.

Agent and Queue Symbols

Icon	Name
Agent Status	
	Prime Agent (Green)
	Backup Agent (Blue)
	Overflow Agent (Red)
Call Status	
	A call is currently ringing on this agent's phone.*

Icon	Name
🔲	The agent is currently on a call.*

* = Symbol colors:
- Green: Inbound non-queue call
- Pink: outbound non-queue call
- Yellow: inbound queue call
- Blue: outbound queue call

Queue Modes

Icon	Name
❇	Day mode
🌙	Night mode
⬥	Redirect/Unattended mode
⚠	Emergency mode
✈	Holiday mode
❄	Snow Day mode
⊗	The queue is blocked

Answer a Delivered Queue Call

1. Press **Enter** (or **F2**).
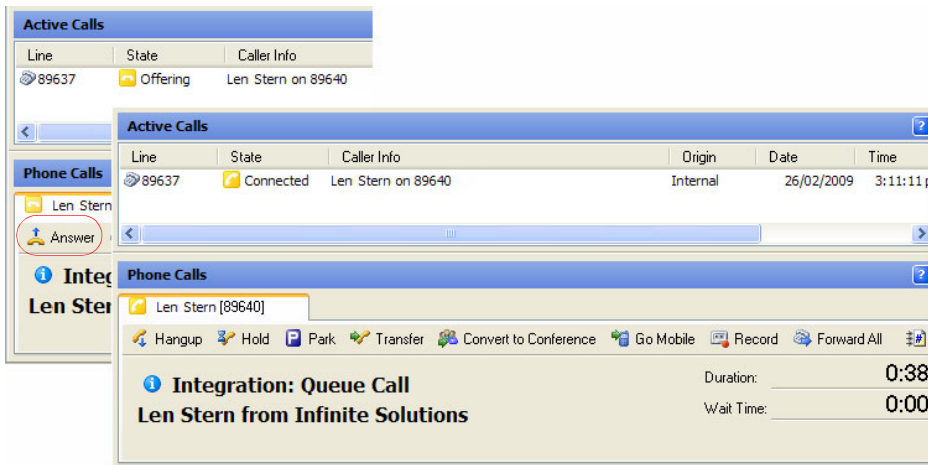
2. In the Phone Calls window, click **Answer**.

> *Note:* If you do not answer the queue call in the required time, you may be logged out or placed on a break or worktime, depending on how the system is configured.
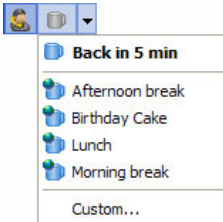
Breaks

Take a Break

While logged into a queue, you can request a break to indicate to the system that you are temporarily unavailable to receive queue calls.

> *Note:* While on a break, you still receive inbound direct calls to your extension.

1. In the toolbar, click either the **Break:**
   • Icon to use the default **Back in 5 Mins**. No further action is needed.
   • Down arrow to display a list of break reasons, and then proceed to the next step.

2. From the **Break** list, select either:
   • A break reason and set the required break time.
   • **Custom** to set up another reason that is not listed.

> *Note:* Individual security permissions control which options can be set and used by the agent.

End a Break

➤ To be available and receive queue calls again when returning from a break, click the **Break** icon to cancel the current break.

> *Note:* If the agent is overdue from a break, the **Break** icon turns red.

Worktime

Use Worktime to become unavailable in taking queue calls and when engaged in a work-related task. Worktime differs from Break time in that Break time is meant for non-work related tasks.

After-Call Worktime

When completing a queue call, you may be automatically placed on worktime, allowing time to complete any call-related tasks before a new call is appears (the duration is determined by the system administrator).

Request Worktime

➤ Either click the:
   • **Request Worktime** icon to initiate the default worktime.
   • Down arrow to select an alternative worktime reason from the menu.

Request More Worktime

➢ Click the **More Worktime** icon.

End Worktime

➢ Click the **Worktime** icon.

Request a Queue Call

In most cases, the system automatically delivers calls. Demand delivery allows requesting delivery of a call.

Note: The demand delivery function requires special permissions to be set by the administrator.

➢ To receive a call on demand, perform one of the following:

• Click the **Demand/Request a Queue Call** icon on the Agent toolbar
• Press **F9**.
• In the Queues window, right-click a queue to select a call from that specific queue.

Enter Wrapups from Desktop

A wrapup uses codes to provide a record of how a call concluded. Each queue can have its own unique wrapup templates with appropriate details.

• **Forced Wrapup** = A Wrapup window automatically displays when completing the queue call.
• **Manual Wrapup** = At any time during the call, click either the:
    — **Wrapup** icon in the Agent toolbar.
    — **Resolve** icon in the Phone Calls window.
• **Recent/Previous Call** = Double-click the call in the Call Resolution window to assign a wrapup code for a previously-completed call.

Resolve a Call with a Wrapup Code

1. Select a **Wrapup Code** for the call by selecting an item from each list (up to three lists can display).
2. Optional: Select a worktime reason to use after completing the wrapup (if this option is enabled).
3. Click the **Wrapup** button.

Process Callbacks from Desktop

The Callback feature provides callers the option to be called back by one of the agents, rather than wait in the queue for their call to be delivered. Callers leave a callback message and hang up, and still maintain their position in the queue. The message is delivered to the agent in place of the call.
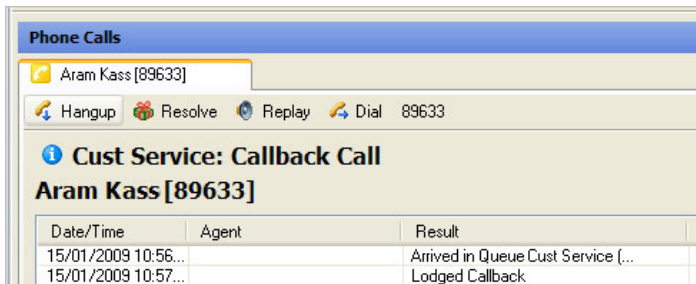
Respond to a Callback from Desktop

When the callback delivers, the Phone Call window shows that it is a callback and includes the callback's history.

➢ Click the **Answer** icon.

Answer a Callback

1. When answering a callback request, the Callback window displays. Any message left by the caller automatically plays.

2. Click the:
   • **Replay** icon to hear the message again.
   • **Dial** icon to establish the callback. To change the phone number, use the **Call** field.
   • **Resolve** icon to provide a callback result.

Resolve a Callback

After clicking the **Resolve** icon, you are prompted to resolve the callback with a callback result. This enables the system to determine what to do with the callback.

1. When the Call Resolution window displays after completing the callback, select the appropriate callback resolution.

2. If wrapup is also required, select the appropriate wrapup details (specific to each site).
3. Click the **Wrapup** button.

> ⚠ **Important!** If the agent does not resolve the call correctly or hangs up without resolving the call, the callback is placed back into the queue and delivers to the next available agent.

Desk-to-Desk Chat

Use Desk-to-Desk chat to have a conversation in real time with other internal users by typing text.
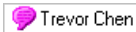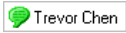
The Chat Tab

➢ Click the **Chat** tab to open the Chat window.
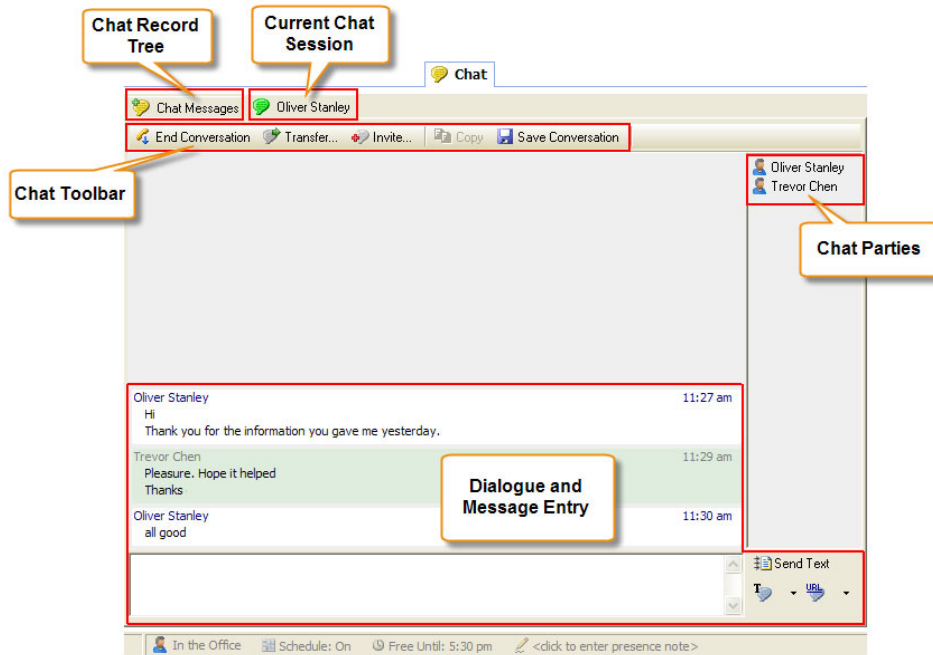
Chat Buttons

Button	Description
Initiate Chat...	Starts a new chat call to either a selected chat user or chat queue.
End Conversation	Ends the current chat call.
Transfer...	Transfers the current chat call to either a selected chat user or chat queue.
Invite...	Invites one or more chat users to join the current chat call. Invitees must accept the invite to join.
Copy	Select the chat window, and then click the **Copy** button to copy the chat window to the clipboard.
Save Conversation	Saves a transcript of the chat conversation in a text format to a specified disk directory.
Send Text	Transmits the typed text. Alternatively, press the **Enter** key.
Close	Closes the current chat window.
Chat Templates...	Adds, edits, or deletes standard chat phrases or commonly used URL links
T	A list of saved text phrase. When selected, the phrase is sent directly to the other chat parties.
URL	A list of saved URLs. When selected, the URL is sent as a link directly to the other chat parties.
Send Current URL	Pushes the current Desktop browser URL to the chat recipients.

| Button	Description
Trace URL	Automatically sends a series of web page URLs while navigating using the Desktop web browser—toggles this feature on and off.
Trevor Chen	Chat conversation—when pink, an outbound chat conversation.
Trevor Chen	Chat conversation—when green, an inbound chat conversation.

Make a Chat Call

1. Click **Initiate Chat** to start a new chat call.
2. Click either **Chat User** or **Chat Queue**, and then select the specific entry from the list.
3. Click the **Chat** button in the window, and a new conversation window opens.
4. In the message text field, type the message and then click **Send Text** (or press the **Enter** key) to transmit the typed text. An outbound chat call shows as waiting in the Active Calls window until the recipient answers the call.

End a Chat Call

1. Click **End Conversation**.
2. Optionally, click **Save Conversation** to save a transcript of the chat conversation in a text format to a specified disk directory.
3. Click the **Close** button to close the conversation window.

Answer a Chat Call

1. When a new chat call message displays, either click:
   - **Accept** to answer the chat call, and then navigate to the Chat window by clicking the **Chat** tab.
   - **Show Call** to display the Chat window, and then click **Accept**.
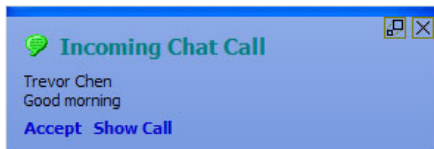
2. In the message text field, type the reply message and then click **Send Text** (or press the **Enter** key) to transmit the typed text.

Transfer a Chat Call

1. Click **Transfer** to transfer the current chat call.
2. From the list, select a chat user or queue.
3. Optionally, click the **Include Current Chat Conversation** option to give the recipient access to the prior dialogue.
4. Click **Transfer** to complete the call transfer.

Invite Additional Chat Participants

1. Click the **Invite** icon.
2. Select one or more chat users to join the current chat call.
3. Optional: Click the **Include Current Chat Conversation** option to give the invitees access to the prior dialogue.
4. Click the **Invite** icon to send the invitations. Invitees must accept the invite to join.

Private Chat

When there are three or more chat participants, you can have a private chat with a selected participant.

1.   Right-click the participant's name.
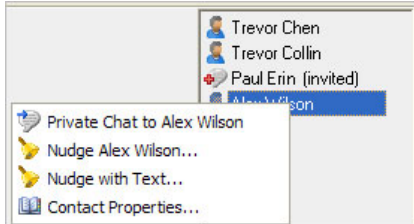
2.   From the menu, select **Private Chat to [name]**. A new chat window opens to enable the private chat session.

Chat Messages

The Chat Messages feature provides an organized listing of chat conversations and chat users. Select the required category and then use the right-click menu to access the available functions for the selected chat session or user.

> **F1** **Help:** For more details on Chat Messages and additional functions and configuration settings, refer to the online help.
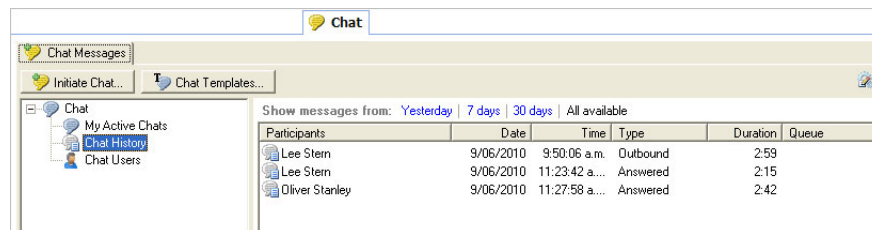
Create and Use Templates

Use the Desktop Agent templates to save and use commonly-used phrases and URLs when chatting.

Create Template

1.   Click the **Chat Templates** icon.
2.   Click either the **Phrases** or **Links** tab in the Templates window. The existing entries that display can be edited or deleted.
3.   Click **Add** and enter a suitable label and the associated text or URL.
4.   Click **OK**.

Use Template

1.   Click the down arrow for either of the following icons:
      •   **Chat Templates**
      •   **URL**
2.   Select the required item from the menu.

      The text phrase is automatically sent to the other chat parties. The URL is pushed to the other chat parties.

> *Note:* When a URL is received in:
> •   Desktop, the URL shows as an active link and the built-in Web Browser automatically opens the web page.
> •   Executive Insight, the URL shows as an active link.

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